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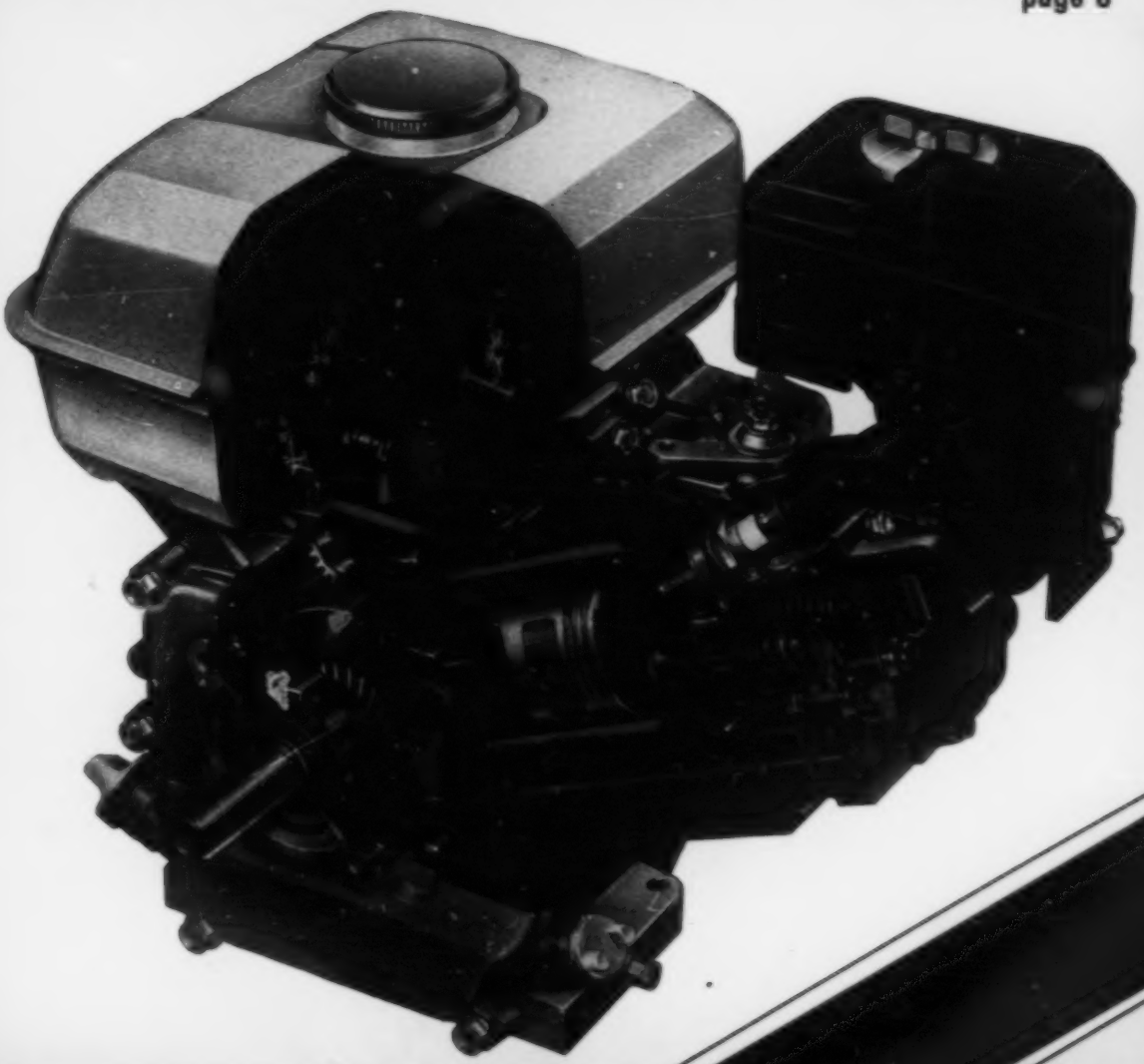
The business magazine of the farm and industrial equipment industry FEBRUARY 1985

Reader Views of the Big Merger page 26

Big Changes in Small Engines

page 8



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INTERTEC PUBLISHING CORPORATION

Implement & Tractor

The business magazine of the farm and industrial equipment industry.

February 1985 • Vol. 100 • No. 3

8: Big Changes in Small Engines. Engineering advances like Honda's overhead valve system for lawn mower engines have added some excitement and new competitors to the small engine market.

14: Forecasters' View of 1985: Not Much Change. A flat year ahead is the concensus of executives from FIEI member companies.

18: Silver Linings in Smithfield Clouds. British manufacturers could manage some smiles at the recent Smithfield farm equipment show in London.

22: How Nebraska Tests Change. Part 3 of a series on the tractor tests looks at what has changed and what's being discussed.

26: Survey Finds IH/Case Merger is Welcomed. Responses to a special I&T survey finds readers think the big merger will help the business.

32: You Don't Have to be Big to Have a Winter Service Program. The fourth installment of our Management Modes series shows how off-season service works for a modestly sized dealership.

34: Dealers See Better Year in 1985. The I&T FDO Survey report finds dealers optimistic about sales and profits in the coming months.

On the cover...Cutaway view of a new small Honda overhead valve engine.

DEPARTMENTS

I&T Update....4
Editor's Notebook....6
Auction Prices....24
What's New....28
New Literature....42
Industry in Motion....44
Brown Pages....45
Classified Ads....50
Index to Advertisers....50

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I&T Update

U.S. Retail Sales, '84: 117,685 Tractors, 11,441 S-P Combines

Retail sales of farm equipment in the U.S. wound up 1984 with a slight gain in unit sales of tractors, based on strong showings in the lower horsepower categories, and declines in other product groups. The complete flash report provided by the Farm & Industrial Equipment Institute:

Unit Retail Sales

	December			January-December		
	1984	1983	Pct. Change	1984	1983	Pct. Change
Farm Wheel Tractors:						
2-wheel drive						
Under 40 hp	3,245	2,018	+60.8	50,934	45,596	+11.7
40-99 hp	2,770	2,541	+ 9.0	38,270	38,082	+ .5
100-139 hp	737	838	−12.1	9,846	14,503	−32.1
Over 140 hp	902	936	− 3.6	14,659	13,651	+ 7.4
Total 2-wheel drive	**7,654**	**6,333**	**+20.9**	**113,709**	**111,832**	**+ 1.7**
4-wheel drive						
Under 200 hp	177	233	−24.0	1,532	2,075	−26.2
Over 200 hp	225	243	− 7.4	2,444	3,026	−19.2
Total 4-wheel drive	**402**	**476**	**−15.5**	**3,976**	**5,101**	**−22.1**
Total All Tractors	**8,056**	**6,809**	**+18.3**	**117,685**	**116,933**	**+ .6**
S-P Combines	889	1,207	−26.3	11,441	12,755	−10.3
Balers (under 200-lb. bales)	203	170	+19.4	8,313	9,036	− 8.0
Forage Harvesters (shear-bar type)	157	142	+10.6	3,539	4,091	−13.5
Mower-Conditioners	343	427	−19.7	13,057	14,261	− 8.4

Canadian '84 Sales Picture Like the U.S.

Retail sales of farm equipment in Canada, according to the Canadian Farm & Industrial Equipment Institute, were down from 1983 levels in all product categories except tractors.

Product	Unit Sales	Pct. Change
Farm Tractors:		
Under 40 hp	3,450	+22
40-99 hp	8,536	+23
100 hp and over	5,112	− 9
4-wheel-drive	2,512	− 1
Total tractors	19,610	+ 9
Combines (S-P)	2,721	− 7
Combines (P-T)	904	−35
Balers (−200 lbs.)	1,880	− 4
Balers (+200 lbs.)	1,987	−18
Mower-Conditioners	2,195	−11
Swathers (S-P)	1,987	−23
Swathers (P-T)	2,218	− 8
Forage Harvesters	598	−11

Steiger Tractor's '84 Sales: $122 Million

Steiger Tractor Inc. reported sales for fiscal 1984, ended Sept. 30, were $121.8 million and earnings were $1.9 million, compared with 1983's sales of $108.8 million and a loss of $3.6 million.

The fourth quarter of 1984, Steiger's net income was $16,000 on sales of $25.7 million, compared with a year-earlier net of $379,999 on sales of $29.2 million.

David Koentopf, Steiger president and chief executive officer, said that if the same poor agricultural conditions persist in 1985, it would be too optimistic to expect the company to be profitable in 1985.

U.S. Shortliners Form Marketing Deals With European Firms

Taylor/Pittsburgh Implement, Athens, Tenn., manufacturer of tillage equipment, and JF Fabriken of Sonderborg, Denmark, have reached an agreement whereby Taylor/Pittsburgh will market JF's line of harvesting equipment in the U.S. under the brand name JF-Pittsburgh.

The line includes a tractor-mounted grain combine, hay mowers, rakes, conditioners and tedders and forage harvesters.

Agrotec Inc., Pendleton, N.C., manufacturer of spraying equipment, has formed a joint venture with Berthoud S.A., French sprayer manufacturer, to sell Berthoud's air-blast sprayers in the eastern U.S. through Agrotec dealers.

USDA Expects Farmers Will Spend $7.3-7.5 Billion on Machinery

The U.S. Dept. of Agriculture's Economic Research Service is projecting that U.S. farmers' purchases of farm machinery in 1984 were about $7.4 billion and will range from $7.3 billion to $7.8 billion in 1985.

Since 1979, notes ERS, power takeoff capacity for over-40-hp tractor purchases have declined from 15.3 million hp to 6.6 million hp in 1984.

Deere Announces Executive Retirements

Among recent retirements announced by Deere & Co., effective Nov. 30, are the following:

Dr. Gordon H. Millar, vice-president, engineering, since 1972, with the company since 1963. He is currently president of the Society of Automotive Engineers.

Donald O. Carl, director of sales branches, with Deere since 1955.

Willard L. Stowell, director of sales branches, with the company since 1950.

Calvin C. Peterson, director of manufacturing, with Deere since 1952.

Forrest R. Frazier, director of overseas industrial sales, after 33 years with the company.

Researchers Ponder Combines Equipped With Rotary Mowers

Combines equipped with disk-type mowers could save substantial amounts of soybeans that are lost by conventional harvesting methods, according to USDA research.

USDA agricultural engineer John W. Hummel, Urbana, Ill., and other researchers at the U. of Illinois conducted laboratory tests involving high-speed movies and automated data analyses, which simulated harvest losses of less than 2 per cent. Current average loss is about 3.8 per cent.

Wing disks, mounted on the mower frame of a mock-up combine cutterbar, operated at 3,000 rpm with a simulated ground speed of 5.1 mph. Harvest losses were greater at a slower speed—3.4 mph.

Briefly...

The European Economic Community executive committee has fined Deere & Co. $1.4 million for what it said are violations of anti-trust rules forbidding agreements and practices restricting competition. Deere was charged with pressuring dealers in countries in which its products are cheaper not to sell to residents of other EEC nations in which the goods may be more costly. Deere has said it may appeal to the European Court of Justice, according to the *Wall Street Journal*.

U.S. RETAIL SALES FORECAST, 1985, 1986
(In Units)

	Actual Sales 1983	Predicted Last May For 1984	Actual Sales 1984	Sales Forecast For 1985	Sales Forecast For 1986
Farm Tractors:					
Under 40 hp	45,596	46,750	50,934	50,000	51,000
40-99 hp	38,082	41,000	38,270	39,000	40,000
100 hp and over	28,154	31,000	24,505	24,500	24,100
4-wheel drive	5,101	6,000	3,976	3,800	4,200
Total Farm Tractors	116,933	124,750	117,685	117,300	119,800
S-P Combines	12,751	16,000	11,441	11,650	12,000
Corn Heads	6,830	8,650	6,400E	6,600	7,000
Forage Harvesters[1]	4,091	4,100	3,539	3,100	3,300
Balers, Square[2]	9,037	8,700	8,313	8,200	8,200
Balers, Round[3]	12,200E	12,800	11,000E	11,200*	11,600**
Windrowers	2,593	3,315	2,300E	2,600	2,700
Mower-Conditioners	14,261	14,825	13,057	13,100	14,000
Grinder-Mixers	4,018	4,300	2,400E	2,800	3,000

E—I&T estimates. [1]Shear-bar type [2]Bales under 200 lbs. [3]Bales over 200 lbs.
*Given as +2% **Given as +3.5%
Source: Farm & Industrial Equipment Institute.

Forecasters' view of 1985: Not much change

By Bill Fogarty

■HERE'S THE consensus forecast for U.S. retail sales of farm equipment. It covers tractors, main types of field equipment, and farmstead and related equipment. Member executives of the Farm & Industrial Equipment Institute's Marketing & Management Conference made their individual forecasts in December. Their answers were collated and median figures drawn. Some product types are expressed in terms of percentage change from the previous year; others in terms of units.

And what do they see for 1985? The first table indicates a generally flat year, with some products slightly ahead and others down from preliminary results of 1984. As for 1986, the group sees generally modest improvement.

The second table, covering several types of farmstead and field equipment and dealing in percentages only, is generally more optimistic for both 1985 and 1986.

The good news. The first table not only discloses the forecasts; it

(More...)

provides some history: actual sales in 1983, what the group was forecasting for 1984 when last polled in March and April of 1984, and preliminary numbers in most product categories on 1984 actual sales.

The group was predicting a better year in 1984 than was experienced—in all categories except one. Sales of tractors under 40 horsepower roared to a modern-day high of almost 51,000 units, but the forecast had called for a volume of 46,750.

The industry's track record in recent years for forecasting incorrectly being what it is, at least on a consensus basis, perhaps there is a ray of hope. In the past, upturns in the marketplace have caught the industry's marketers as flatfooted as have the downturns. And if they anticipate no improvement of consequence in 1985, perhaps they'll be wrong again!

Other questions. There were 84 companies participating in this year's forecast, 47 from FIEI's Farm Equipment Div., 37 from the Agri-Equipment Div. In addition to wrestling with product outlooks, they had other questions to answer.

As for general industry outlook, *i.e.*, 1985 retail dollar volume in comparison with the 1984 level, the FED group forecast a 1.7 per cent increase. The AED participants saw no change.

They were asked what impact they expect the 1985 Farm Bill now under consideration will have on the agricultural equipment business in the first 24 months after enactment.

Ten of the respondents thought it would have a positive impact; 32 expect a negative impact and 30 see a neutral effect.

The ones who thought positively cited the idea that the farmer would be able to make long-term plans and buying decisions, and that marketplace stability would be helped.

Negative respondents expressed concern about the likelihood of less government involvement and payment to agriculture, delaying a rebound in equipment buying.

A large majority of participants (45) expect farm consolidations to increase in 1985; only six expect a decline and 30 others expect the rate to stay the same. Regardless of how they sized up the rate of consolidation, the majority of comments indicated that the decline in farm numbers itself would continue producing a negative effect.

The ranges. Since this is a consensus forecast, it may be of interest to examine the range of predictions that lead to the median figures in the tables. Thus, on 1985 predictions, we have these spreads:

Tractors under 40 hp: 48,400 to 52,500.

Tractors 40-99 hp: 36,700 to 42,000.

Tractors 100 hp and over: 20,000 to 29,000.

Four-wheel-drive tractors: 3,600 to 4,900.

Combines: 10,200 to 15,000.

Corn heads: 5,500 to 7,000.

Forage harvesters: 2,600 to 4,200.

Balers (square): 7,500 to 9,000.

Balers (round): −5 to +10 per cent.

Chisel plows: −24 to +5 per cent.

Grinder mixers: 2,500 to 3,400.

Manure spreaders: −2.7 to +13 per cent.

Lawn and garden: zero to +10 per cent.

Augers/elevators: −10 to +30 per cent.

In-bin dryers: −20 to +25 per cent.

Batch, continuous-flow dryers: zero to +15 per cent.

Dairy/beef equipment: −10 to +5 per cent.

Grain bins: −40 to +44 per cent.

Milking machines: −20 to +5 per cent.

And the range of change in retail dollar volume ran from −15 to +12 per cent among Farm Equipment Div. participants; among Agri-Equipment Div. forecasters, it was −15 to +32 per cent.

1985-1986 Forecasts on Other Products: Spreaders, Tillage, Agri-Equipment, Lawn/Garden

(Per cent change from previous year's unit volume)

Product	1985	1986
Manure Spreaders	0	−2.8
Moldboard Plows	−5.0	−5.0
Disk Harrows	0	+2.0
Field Cultivators	+5.0	+5.0
Chisel Plows	+4.0	+5.0
Portable Augers, Elevators	+5.0	+5.0
In-Bin Dryers	+4.0	+5.0
Batch/Continuous Flow Dryers	+9.0	+7.0
Dairy/Beef Equip.	0	+4.0
Grain Bins	+5.0	+8.0
Milking Machines	−5.0	0
Lawn/Garden Equipment	+6.0	

Source: Farm & Industrial Equipment Institute

AUCTION PRICES OF USED EQUIPMENT

An exclusive I&T monthly report of actual prices paid recently at these leading national wholesale auctions.

Asterisk beside tractor price indicates highest bid offered on tractors which were not sold.

JONES FARM EQUIPMENT CO. Dothan, Alabama December 11, 1984

ALLIS-CHALMERS TRACTORS

7030 diesel, 1974 (Fair) 4250
WC, 1944 (Rough) 275
C, 1945 (Fair) 500*
B, 1940 (Rough) 320

CASE TRACTORS

1030 diesel, 1968 (Rough) 1700*
530 diesel, 1964 (Fair) 1750

MASSEY-FERGUSON TRACTORS

1155 diesel, 1975 (Rough) 5500
1130 diesel, 1972 (Rough) 2700*
1130 diesel, 1968 (Rough) 2250*
1105 diesel, bid., 1977 (Good) 4350*
1085 diesel, 1977 (Good) 4125*
1085 diesel, 1975 (Fair) 3550*
1085 diesel, 1975 (Fair) 3350
275 diesel, 1976 (Good) 6400
265 diesel, 1978 (Good) 6000
265 diesel, 1977 (Good) 5950
265 diesel, 1975 (Good) 6000
265 diesel, 1975 (Good) 5400*
255 diesel, 1979 (Good) 5200*
255 diesel, 1976 (Good) 5000
245 diesel, 1977 (Excellent) 6100
245 diesel, 1976 (Excellent) 5750
230 diesel, 1976 (Good) 3600
180 diesel, 1968 (Good) 3500
180 diesel, 1966 (Rough) 1900*
180 diesel, 1966 (Good) 3000
175 diesel, 1970 (Good) 3475
175 diesel, 1970 (Good) 3450*
165 diesel, 1968 (Good) 2850
165 diesel, 1966 (Good) 2950
165 diesel, 1966 (Rough) 2300
150 diesel, 1965 (Good) 3200
135, 1972 (Excellent) 4100*
135 diesel, 1972 (Good) 2750
135 diesel, 1967 (Good) 3200
135 diesel, 1967 (Fair) 2700*
135 diesel, 1967 (Good) 3275
135, 1967 (Rough) 1250
135 diesel, 1966 (Fair) 2600*
65 diesel, ldr., 1964 (Excellent) 3650
65 diesel, 1963 (Good) 1650*
50, 1959 (Good) 2350
35 diesel, 1963 (Excellent) 3150
35 diesel, 1962 (Excellent) 2750
35, 1960 (Excellent) 2750
35, 1959 (Rough) 1150
35, 1957 (Good) 2400*
35, 1956 (Fair) 1475
25 diesel, 1964 (Fair) 1925
TO30, 1953 (Rough) 725
TO30, 1953 (Good) 1475
TO30, 1953 (Fair) 1100
TO20, 1951 (Good) 1400
TO20, 1950 (Rough) 550
TO20, 1950 (Rough) 625
TO20, 1949 (Good) 1350

FORD-FERGUSON TRACTORS

9N, 1948 (Good) 1225
9N, 1944 (Good) 1000*
9N, 1942 (Rough) 375
9N, 1942 (Rough) 410

FORD TRACTORS

8700 diesel, 1977 (Fair) 6900*
8700 diesel, 1977 (Good) 7600
8600 diesel, 1974 (Fair) 3550
7700 diesel, cab, 1979 (Excellent) 13,500*
7700 diesel, 1978 (Excellent) 11,000*
7600 diesel, 1975 (Excellent) 6100*
7000 diesel, 1975 (Good) 5750
6700 diesel, 1975 (Good) 8800*
5000 diesel, 1972 (Excellent) 5150
5000 diesel, 1970 (Good) 3950*
5000 diesel, 1968 (Fair) 3275
4000 diesel, 1970 (Excellent) 4250*
4000 diesel, 1966 (Fair) 2650
4000 diesel, 1966 (Fair) 2700*
4000 diesel, 1963 (Excellent) 2550
4000 diesel, 1963 (Good) 1925
3600 diesel, 1976 (Excellent) 6500
3000 diesel, 1972 (Fair) 3350
3000 diesel, 1972 (Good) 4100
3000 diesel, 1971 (Good) 3700*
3000 diesel, 1971 (Good) 3800
3000 diesel, 1968 (Fair) 3200
3000 diesel, 1968 (Fair) 2800*
3000 diesel, 1966 (Fair) 2600
2600 diesel, 1979 (Excellent) 5100*
2000 diesel, 1971 (Fair) 2400
2000 diesel, ldr., 1967 (Fair) 2750
2000 diesel, 1967 (Fair) 2625
2000 diesel, 1966 (Fair) 2650
2000, 1963 (Good) 2725
961, 1958 (Good) 1975*
861, 1960 (Fair) 1400
841 diesel, 1958 (Fair) 1550
661, 1960 (Good) 1600*
641, 1961 (Excellent) 2300*
640, 1956 (Good) 2000
640, 1956 (Good) 2250
620, 1956 (Good) 1700*
Dexta, 1959 (Fair) 1275
Jub., 1953 (Good) 1850*
Jub., 1953 (Excellent) 2500*
Jub., 1953 (Fair) 1400*
Jub., 1953 (Good) 2075
Jub., 1953 (Good) 1800
8N, 1952 (Good) 1775
8N, 1951 (Good) 1600*
8N, 1951 (Good) 1650
8N, 1951 (Good) 1825
8N, 1950 (Rough) 975*
8N, 1949 (Rough) 850
8N, 1949 (Fair) 1550
8N, 1949 (Fair) 1400*
8N, 1949 (Good) 1600
8N, 1948 (Fair) 900
8N, 1948 (Fair) 850
8N, 1948 (Rough) 700
8N, 1948 (Good) 1550
8N, 1948 (Good) 1600
8N, 1948 (Good) 1325
8N, 1948 (Good) 1400
8N, 1948 (Rough) 675
8N, 1948 (Fair) 1400

INTERNATIONAL HARVESTER TRACTORS

1086 diesel, 1979 (Good) 7900*
1066 diesel, 1973 (Rough) 4700*
966 diesel, 1973 (Fair) 4400
856 diesel, duals, 1970 (Good) 3500
674 diesel, 1976 (Good) 4100
674 diesel, 1976 (Excellent) 5050
656 diesel, 1969 (Fair) 2850
584 diesel, cab, 1978 (Good) 4900
574 diesel, 1973 (Fair) 3500*
464 diesel, 1974 (Fair) 2600*
454 diesel, 1971 (Fair) 2825
434 diesel, (Fair) 1900
Sup. C, cult., 1953 (Good) 675
Sup. C, 1952 (Good) 625
130, cult., plow, plt., 1957 (Good) 1900*
Sup. A, mo., 1953 (Fair) 1250*
185 Cub, Loboy, 1974 (Good) 1700

JOHN DEERE TRACTORS

4640 diesel, 1970 (Excellent) 24,000*
4520 diesel, 1970 (Good) 6350
4440 diesel, cab, 1978 (Excellent) 17,500*
4440 diesel, 1978 (Excellent) 18,000*
4430 diesel, 1977 (Good) 9000
4430 diesel, 1975 (Excellent) 10,100*
4320 diesel, 1971 (Fair) 4300
4030 diesel, 1976 (Excellent) 10,000*
4020 diesel, 1969 (Rough) 3850
4020 diesel, 1967 (Rough) 3500
3130 diesel, (Good) 5100*
3130 diesel, (Excellent) 6800*
3040 diesel, 1978 (Good) 6500*
2840 diesel, 1979 (Excellent) 8550
2640 diesel, 1978 (Excellent) 6700
2440 diesel, 1976 (Excellent) 4350
2130 diesel, cab, (Good) 4200*
2130 diesel, (Fair) 2800*
2030 diesel, 1973 (Good) 3500
2020 diesel, 1968 (Rough) 2350
2020 diesel, 1968 (Good) 3900
1020 diesel, 1968 (Good) 3100*
1020 diesel, 1968 (Excellent) 3800
1010, 1962 (Excellent) 1800
820 diesel, 1973 (Good) 2250
420, 1957 (Good) 825*
MT, cult., 1949 (Good) 700

KUBOTA TRACTORS

L225 diesel, 1976 (Excellent) 2275
L225 diesel, 1976 (Excellent) 2250
L225 diesel, 1976 (Excellent) 2100*

LONG TRACTORS

460 diesel, (Excellent) 4100*
360 diesel, (Good) 3450

OLIVER TRACTORS

1465 diesel, 1974 (Fair) 2200
1365 diesel, 1973 (Fair) 2000

YODER & FREY, INC. Archbold, Ohio Dec. 11, 1984

INTERNATIONAL HARVESTER TRACTORS

BN, 1946 (Fair) 475
H, 1947 (Fair) 450*
H, 1939 (Rough) 375*
H, 1950 (Fair) 725
H, 1946 (Fair) 450*
H, 1951 (Fair) 685
H, 1949 (Good) 775
H, 1944 (Rough) 375
H, 1947 (Fair) 450*
SH, 1951 (Fair) 525*
M, 1946 (Rough) 375*
M, 1942 (Fair) 425*
M, 1940 (Rough) 500
M, 1950 (Fair) 975
M, 1948 (Fair) 725*
Sup. M, 1952 (Fair) 900
Sup. M, 1951 (Rough) 950*
Sup. M, 1952 (Fair) 640
Sup. M, 1950 (Fair) 760*
Sup. M, 1950 (Fair) 660
140, 1960 (Fair) 2450
200, 1957 (Fair) 800*
200, 1958 (Fair) 850
300, 1957 (Fair) 1025
340, 1959 (Rough) 1300
350, 1957 (Fair) 925
434 diesel, (Rough) 1200*
460, 1959 (Fair) 1075*
460, 1960 (Fair) 1450
560, 1962 (Good) 2650*
560 diesel, 1960 (Fair) 2275
560, 1958 (Fair) 1300*
565 diesel, 1969 (Fair) 4200*
565 diesel, 1968 (Fair) 3900
565, 1968 (Rough) 3100*
C, ... 250
684 diesel, 1977 (Fair) 4200*
686 diesel, 1978 (Fair) 5500*
706, 1965 (Fair) 2750*
706, 1964 (Fair) 1900*
706, 1964 (Rough) 1900*
756, 1970 (Good) 5500
756, 1969 (Fair) 3100
756, 1968 (Fair) 5600*
766 diesel, 1973 (Fair) 3700*
806, 1965 (Fair) 4050
806, 1964 (Rough) 1750
806, 1964 ..... 2600*
806, 1966 (Fair) 3400*
856 diesel, 1969 (Good) 6300*
856, 1967 (Good) 6500*
966 diesel, 1972 (Good) 7200*
966, 1972 (Good) 6800*
966, 1974 (Fair) 7750*
966, 1974 (Fair) 7000*
986, 1976 (Good) 10,200
986, 1977 (Good) 11,500*
1066, 1973 (Fair) 6450
1066, 1976 (Fair) 7000*
1066, 1974 (Fair) 6100
1066, 1971 (Good) 7800*
1066 diesel, 1973 (Fair) 6700*
1066 diesel, 1972 (Fair) 6600*
1066, 1973 (Rough) 4100*
1086, 1977 (Good) 10,000*
1086, 1977 (Good) 10,000
1086, 1978 (Rough) 11,250*
1086, 1979 (Good) 12,200
1206, 1964 (Fair) 3600*
1206, 1964 (Fair) 3800*
1256, 1969 (Fair) 5300*
1256 diesel, 1970 (Fair) 5250*
1256, 1970 (Fair) 5400*
1456, 1968 (Fair) 4800*
1466, 1975 (Fair) 6800*
1466, 1975 (Fair) 6100
1466, 1974 (Fair) 5750*
1466, 1973 (Good) 7200*
1468, 1977 ..... 12,500*
1586, 1977 (Good) 11,250*
3788, 1979 (Good) 20,000*
4166, (Rough) 6000*

FORD TRACTORS

8N, ... 1400
8N, ... 1300
8N, 1947 (Fair) 800*
8N, 1947 (Fair) 975*
8N, 1950 (Fair) 1200*
9N, 1944 (Rough) 800*
9N, 1941 (Rough) 850*
NAA, 1954 (Fair) 1750
700, ... 1250

(Continued on page 36)

Scott Nesbitt:

Survey Finds IH/Case Merger Is Welcomed

How Readers View the IH/Case Merger

Type of Dealer	Will Help	Will Hurt	No Impact
International Harvester	82	8	0
J I Case	16	5	1
Deere	35	17	11
Allis-Chalmers	4	9	0
Ford	6	7	7
Massey-Ferguson	2	3	3
Kubota	1	1	2
White	1	1	2
Other Brands	5	6	4
Non-Dealers			
Indepedent Repair Shops	4	4	8
Manufacturers	12	6	4
Sales Reps, Marketing	10	8	2
Farmers	8	8	3
Total 316:	**186**	**83**	**47**

Responses to question "How will the Case/Harvester deal affect your business? Survey form published in December, 1984 *Implement & Tractor.*

IH and Case dealers are almost bursting with joy, while others think the proposed merger of those two lines will at least do more good than harm for business.

That's one of the conclusions that can be drawn from the 316 responses I&T got to a survey that ran in the December I&T, shortly after Tenneco, Inc., announced plans to purchase International Harvester's ag division and merge it with J I Case operations. (The deal was pending government approval at I&T presstime.)

When responses were broken down into categories and the dealers were sorted into the brands of equipment carried, 82 IH dealers said the deal would help their business, against only eight who said it would hurt.

On the Case side, 16 said it will help, five said it would hurt, and one said it would have no impact. That one explained he had no local IH competitor, and added that the deal will strengthen Case as a farm equipment manufacturer.

As the table shows, Deere dealers also thought the deal would help more than hurt, especially when the "help" and "no impact" responses are added together.

Of all types of dealerships, only Allis-Chalmers dealers recorded a strongly negative response. The others had rather mixed reactions, but generally those who said it would hurt their business were outweighed by the "help" and "no impact" responses taken together.

The rest of the conclusions from the table can be drawn by the reader, with a cautionary note: Many multi-line dealers responded and they were classified by the first brand name listed. To list responses by specific combinations of lines would be unwieldy and add little information.

Note also that the survey is not to be considered scientifically accurate, due to the sampling method and inability to screen out multiple responses from extra-eager individuals.

Words of wisdom

The survey numbers may not be scientific, but the comments jotted on the survey form proved to be lengthy and generally very thoughtful.

"The merger should produce a stronger number two manufacturer, but I don't look for any major jump for at least five years, until the loyal IH customers get over the shock of the sell," wrote one IH dealer, picking up the general tone of comments that the merger would help in the long run.

Many dealers, from all brands, made comments like this one: "In the short term, customers are all expecting big rebates from IH."

Worry about a "closeout" sale on IH products was widespread, with Deere frequently seen as the beneficiary if the market was heavily disrupted by massive price cutting.

"We should be able to gain market share in areas where IH has been our main competitor," wrote one Deere dealer. Another commented the merger "will make Tenneco look at the profit-or-loss line with more respect. I believe they will be less competitive because

(Continued on page 44)

FDO Survey Report

Dealers See Better Year in 1985

■IS IT THAT hope springs eternal? Could it be that dealers are natural optimists? Or do they just understand their markets better than anyone else?

Whatever the reason, a large majority of the dealers who ventured predictions for 1985 in an I&T survey see a moderately better year coming for their businesses.

Of 66 dealers who answered the survey, which appeared in the November I&T, 40 predicted an upturn in gross revenues for 1985, while 11 saw a downward trend, and 15 expected things to stay about the same.

"This is just wishful thinking," wrote one dealer who joined the "uppers." And even one of those who saw his gross revenues slipping by 5 per cent predicted his profits would go up by 20 per cent, explaining that "parts sales and resulting service sales are very profitable and building."

All three groups—uppers, downers and samers—predicted that parts and service sales would go up, by 9.8 per cent and 7.7 per cent respectively. The combined groups also predicted that wholegoods sales would go up 5 per cent, and used wholegoods sales would rise 4 per cent. The uppers were even more optimistic.

The stars of the wholegoods categories were tractors under 40 hp, predicted to go up 10.1 per cent, and combines, up 8.5 per cent.

Deriving the predictions

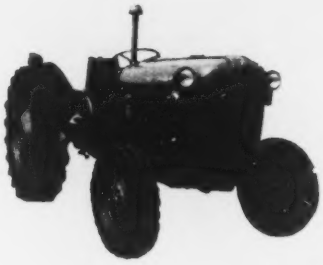
Not every dealer put down a number in the space provided for predictions on the survey form. Those who didn't were not counted in deriving the predictions shown in the table, though it should be noted that the trend of those who simply checked an up or down space followed that of the general trends expressed by each group.

To get the predictions shown, we added all the up and down predictions with those who predicted "same"—which translates to a zero per cent prediction—and took a simple average.

Scientific? Probably not. Optimistic? Definitely.

It's interesting to note that only 37 of the 66 responding dealers said they were overstocked, and those who said they were averaged out to a 14 month supply, with the highest estimate reaching 24 months reported by eight dealers.

INTRODUCING
IMT 539 Deluxe



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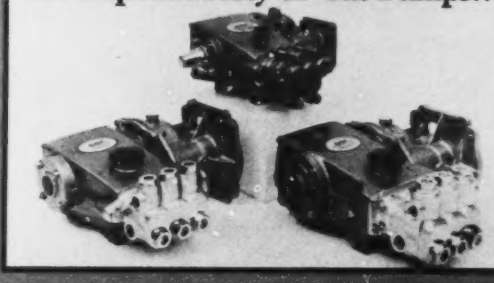

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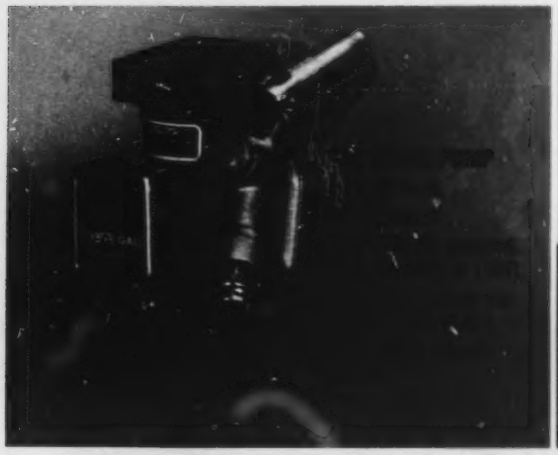
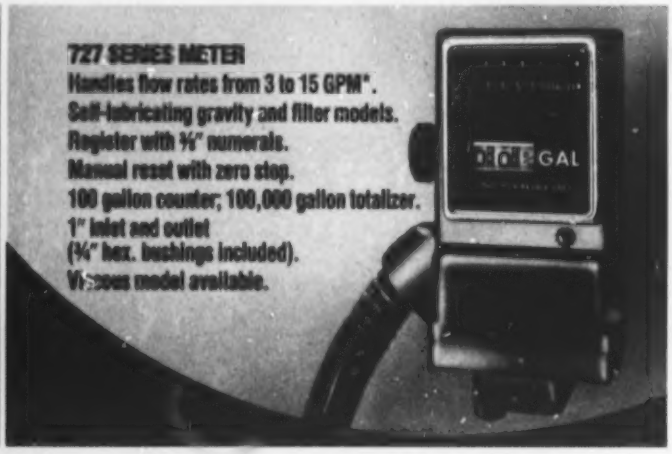
Most Dealers See 1985 Sales Upturn

Group Number in group	Uppers (40)	Downers (11)	Samers (15)	Total (66)
What will your GROSS REVENUES do in 1985?	12.5	– 10.8	0	5.9
What will happen to your PROFITS next year?	9.3	– 7.5	– 4	3.6
What changes do you expect in your DEPARTMENTS next year?				
Wholegoods sales	11	– 12.5	3.3	5
Used Wholegoods	8.3	– 7.2	0	4
Parts Sales	12.4	6.2	5.8	9.8
Service Sales	10.7	2	3.7	7.7
What will SALES of these equipment categories do in your business next year?				
Tractors (40 hp and more)	12.2	– 8.7	1.8	6.3
Tractors (under 40 hp)	12.8	0.2	10	10.1
Combines	16.4	– 6.8	0.3	8.5
Tillage tools	8.4	– 6.4	5	5.3
Planters	7.5	– 5.4	5.4	5.1
Fertilizers	– 1.5	– 1.1	0.1	– 1.1
Cultivators	3.2	– 4.3	3.1	2
If you are OVERSTOCKED with new equipment, how long will it take to get down to reasonable levels?	14 mos.	16 mos.	12 mos.	14 mos.
Number of dealers responding	(16)	(10)	(11)	(37)

All respondents gave title as owner, president, vice-president or manager. Table includes responses received by Dec. 10, 1984.

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TOTAL QUALITY ASSURANCE

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Not for resale of fuel
*Flow rates stated are subject to conditions of installations and accessories used

Write in (22) on Reply Card

Auctions

(Continued from page 24)

900, 1958 (Rough) 875
601, 1956 (Fair) 2000
2000, ... 1750
2000, 1964 (Fair) 1500*
4000, 1970 (Good) 3600*
4000, 1963 (Fair) 1275*
5000 diesel, 1966 (Fair) 2400
5000, 1972 (Good) 4900*
8000 diesel, 1974 (Fair) 3800*
8000, 1971 (Fair) 3600
8000, 1971 (Fair) 3400*
9600, 1975 (Fair) 4600
9700, 1972 (Good) 9000*
7800, 1980 (Rough) 5600
2910, ... 8500
3000, 1964 (Fair) 2750
3000, 1966 (Rough) 2600*
3910, (New) 8900*

WHITE TRACTORS

2-70, 1976 (Good) 7750*
2-105, (Fair) 7400
4-150, (Rough) 7000

JOHN DEERE TRACTORS

A, ... 100
70 diesel, 1956 (Rough) 1175
70 diesel, 1955 ..... 875*
70, 1953 (Fair) 600*
620, 1958 (Fair) 1400
520, 1957 (Good) 1950*
510, ... 2200
730, 1959 (Fair) 1725*
2020, (Rough) 3075
2440 diesel, 1979 (Good) 5650
3010 diesel, 1963 (Fair) 3050
3010, 1962 (Fair) 2425
3010 diesel, 1961 (Fair) 3000
3010 diesel, 1963 (Good) 4000
3020 diesel, 1966 (Fair) 4000*
3020 diesel, 1968 (Fair) 3900*
4010 diesel, 1962 (Fair) 3300*
4010, 1962 (Fair) 3100
4010, 1963 (Fair) 3075
4010, 1960 (Fair) 4300
4020, 1966 (Fair) 2800
4020 diesel, 1967 (Good) 6300*
4020, 1966 (Fair) 3400*
4020, 1966 (Fair) 4900
4020, 1971 (Good) 7500*
4020 diesel, 1968 (Fair) 6100*
4020 diesel, 1971 (Good) 7300*
4040, ... 11,400
4230, ... 11,000
4240, 1983 (Excellent) 23,000*
4320, 1972 (Fair) 7450
4440, 1979 (Fair) 18,500*
4440, ... 14,500
4630, 1975 (Fair) 11,500*
6030 diesel, 1972 ..... 9250*

CASE TRACTORS

400 diesel, 1958 (Fair) 1300*
730, 1965 (Fair) 900*
830 diesel, 1966 (Good) 2200*
830, 1969 (Rough) 2100*
830, ... 800
930 diesel, 1967 (Fair) 2300*
1070, 1971 (Fair) 7100*
1270, 1976 (Rough) 4400*
1370, 1975 (Fair) 8100*
1370 diesel, 1974 (Fair) 6800*
1470 TK, (Fair) 4500*
2290, (Fair) 8700
2290, 1977 (Good) 13,000*
2670, 1975 (Fair) 10,700*
2670, 1974 (Fair) 10,050
1194 diesel, (New) 7300*
VAC, ... 200

DEUTZ TRACTORS

DX110, 1981 (Good) 10,300
DX110, 1980 (Good) 11,500*
D5006, (Rough) 3750*

MINNEAPOLIS-MOLINE TRACTORS

445, (Rough) 450*
445, 1955 (Fair) 1000
M-670, 1964 (Fair) 900*
M-670, 1962 (Fair) 2350
G-1000, 1967 (Fair) 2000
Z, 1952 400

ALLIS-CHALMERS TRACTORS

WD, ... 1000
WD-45, 1955 1150
D-15, ... 2900
D-17, 1963 (Fair) 1400
D-17, 1960 (Fair) 1750
D-17, 1963 (Fair) 2050*
170, 1964 (Fair) 3350
185, 1975 (Rough) 4000
185 diesel, 1976 (Fair) 4500*
190, ... 2750
190XT, 1966 (Rough) 3500
190XT diesel, 1970 (Good) 3000*
200, 1971 (Good) 5750*
200, 1971 (Fair) 6100
210, ... 2850
5040 diesel, 1975 (Fair) 3100*
7000 diesel, 1976 (Good) 7400*
7030 diesel, 1977 (Fair) 6100*
7050, 1976 (Fair) 5400*
7580, 1976 (Fair) 13,500*

FERGUSON & MASSEY FERGUSON

TO-30, 1950 (Rough) 1100
F-40, ... 1650
50 diesel, 1962 (Fair) 2100*
50, ... 1450
65 diesel, 1962 (Rough) 1425
65 diesel, 1961 (Rough) 1250
135, 1968 (Fair) 2250
180, 1967 (Fair) 2900*
1085 diesel, 1976 (Rough) 4700*
1085, 1976 (Fair) 4500*
1105 diesel, 1977 (Fair) 4700*
1135 diesel, 1975 (Fair) 5750*
1500, 1974 (Fair) 4900
178, ... 3175

DAVID BROWN TRACTORS

950 diesel, 1964 (Rough) 500*

OLIVER TRACTORS

1555 diesel, 1966 (Good) 3000
1600, ... 1950
1650, ... 2775
1650, 1965 (Fair) 2400*
1750, 1964 (Fair) 2900
1755, 1973 (Fair) 4300*
1800 diesel, 1961 (Fair) 2000*
1800 diesel, 1961 (Fair) 1925
1850, 1966 (Fair) 2800*
1850, 1967 (Fair) 3800
1855, 1972 (Good) 5100
1855 diesel, 1973 (Good) 4900*
1950, 1965 (Fair) 4000

LONG TRACTORS

56 diesel, (Fair) 3500

KUBOTA TRACTORS

L285 diesel 3150
B6100-D 3800*

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Not just a filter, but a fluid guard system that extends equipment life up to two to three times.

Cut your operating, maintenance, and downtime costs with a Harvard fluid guard system. Harvard keeps your oil ultra clean. It's a fact, clean oil lasts longer and reduces costly engine, hydraulic, and transmission wear. And that means improved equipment life. It just makes good sense to protect your investment and save money in the process with Harvard.

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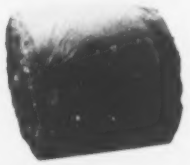
Bale Bonnet®
Original System

- One-man operation, fastens securely to the bale in about 90 seconds
- Available for 5' and 5'6" long bales
- Low annual investment, reusable four or more years with proper care
- Open ended, loose fitting, air circulates and prevents condensation
- Can move bale with cover on



Bale Sleeve™

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- Available for 6' diameter bales
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- Open ended, loose fitting, air circulates and prevents condensation
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- Reduce ground moisture spoilage

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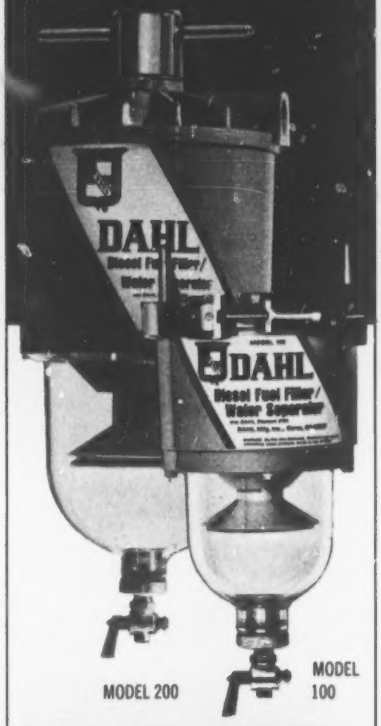

MODEL 200 MODEL 100

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(209) 538-1122 TELEX 364412 INTR

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Welcome Merger

(Continued from page 26)

it's a larger part of their total business" (than when they owned Case alone).

A presumably survey-conscious Deere dealer wrote, "We feel IH customers with loyalty to it will more likely than not purchase JD rather than Case the next time. In every case, the IHC customer we talked to said JD was their original second choice."

A-C dealer comments

The fact that Allis-Chalmers dealers took a more negative view of the deal than others was hard to explain other than that none of the 13 dealers in that category said it would have no impact on their particular business. Among other brands, the "hurts" led or matched the "helps," but the presence of those who checked "no impact" balanced things out.

Typical of many comments from A-C and other dealers was this one: "We have been helped some in the last two years because a few IH users were coming our way. This will stop if the dealer organization doesn't crumble."

Another dealer listed reasons he felt he'd be hurt: "1. Inventory will be sold at cheap prices. 2. Combined they (Case and IH) will be hard to beat for a small company. 3. Make market unstable for years to come."

Industry in Motion

Fleischer Mfg., Inc., Columbus, Neb., has donated a Buffalo All-Flex till planter and a Buffalo cultivator to the Central Community College at Hastings, Neb.

Eddie D. Estes, president of **Western Kansas Manufacturers Assn. 3i Show,** has been elected president of the **North American Farm Show Council.** The Council membership consists of 17 farm shows that are held in the U.S. and Canada each year.

Jon P. Adamson has been named vice-president and general manager-Diesel Systems at **United Technologies Automotive,** Dearborn, Mich. Also, the Diesel Systems division is now consolidated with the Components division based in Columbia City, Ind.

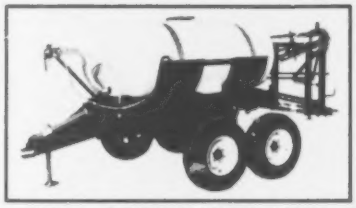
Durwood Phillips has been appointed the new president of **Powell Mfg. Co., Inc.,** Bennettsville, S.C., succeeding Robert W. Wilson who has retired.

The Gregory Mfg. Co., Lewiston-Woodville, N.C., has bought the business and assets of **Harrington Mfg. Co.,** Lewiston-Woodville, N.C. Charles E. Gregory is president and CEO of The Gregory Mfg. Co.

C. F. Buck Farmer, chairman of **Implement Sales Co., Inc.,** Memphis, Tenn., has announced his retirement effective January 1, 1985. Also, **Gebruder Welger Co.,** West Germany, has appointed Implement Sales Co. as distributor of its line of roll and square balers for the Southern U.S.

Use I&T's Handy Reply Card

THE Kuker LINE



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